



Pet Owner & Vet Perspectives on Parasite Treatment and Prevention: A Global Survey

United States Findings
2025





Background and objectives

Merck Animal Health commissioned research to explore:

- The gaps in pet owners' knowledge about the threat of fleas/ticks, and the subsequent gaps in preventative care.
- Understand veterinarians' role in flea/tick education.
- Pet owner and veterinarian attitudes, usage, and recommendations of products currently in the market.

Methodology



Respondent profile

Pet Owners

Respondents who own a cat and/or dog

Veterinarians

Veterinarians who work at least 10 hours per week in their practice and treat both dogs and cats.



Markets

- Australia

New Zealand

UK

France

Germany
- Italy

US

Brazil

Mexico

Peru
- China

Japan

Spain

Poland

Canada



Sample

4072 pet owners and 582 veterinarians across all markets, recruited via an online panel.



Survey length and fieldwork

Pet Owners

Median: 11 minutes
Dec 23, 2024 - Jan 21, 2025

Veterinarians

Median: 11.5 minutes
Dec 27, 2024 - Jan 28, 2025

Sample by Country

AMERS		
Country	Pet Owners	Veterinarians
Brazil	n=318	n=43
Canada	n=277	n=43
Mexico	n=286	n=52
Peru	n=286	n=40
United States	n=427	n=42
EMEA		
France	n=257	n=41
Germany	n=259	n=41
Italy	n=283	n=42
Poland	n=296	n=38
Spain	n=294	n=42
United Kingdom	n=276	n=42
APAC		
Australia & New Zealand	n=268	n=40
China	n=256	n=52
Japan	n=289	n=24

Executive summary

1 Parasite prevention is commonly discussed during routine check-ups.

Routine check-ups often include discussions and treatments for flea and tick prevention. Vets recognize that pet owners rely on their recommendations for treatments.

2 US vets are 3xs more likely than pet owners to define flea and tick season as year-round.

While most pet owners see flea and tick treatment as essential and are more inclined than global peers to treat year-round, they greatly lag behind vets' views. Additionally, 60% of vets observe flea and tick issues throughout the year in their practice.

3 The large majority of pet owners see fleas and ticks as a threat to their pets and families.

Half of US pet owners see flea and tick-borne illness as a potential risk to their pet or to themselves/family. However, vets report significant non-compliance among pet owners, with two-thirds of vets noting that most pet owners do not follow year-round treatment and are more likely than global counterparts to feel they miss doses. Many owners admit to difficulties and inconsistencies in following treatment instructions.

4 Preference and interest for an annual preventative injection is high among pet owners and vets.

More than half of US pet owners would prefer a less-frequent treatment and trust yearly treatments, although slightly less than their global peers. The duration of effect is among the top consideration when choosing/recommending a treatment. Approximately three-quarters of pet owners and vets are likely to try or recommend annual injections.

Pet owner and veterinarian profiles



Pet owner profile: United States

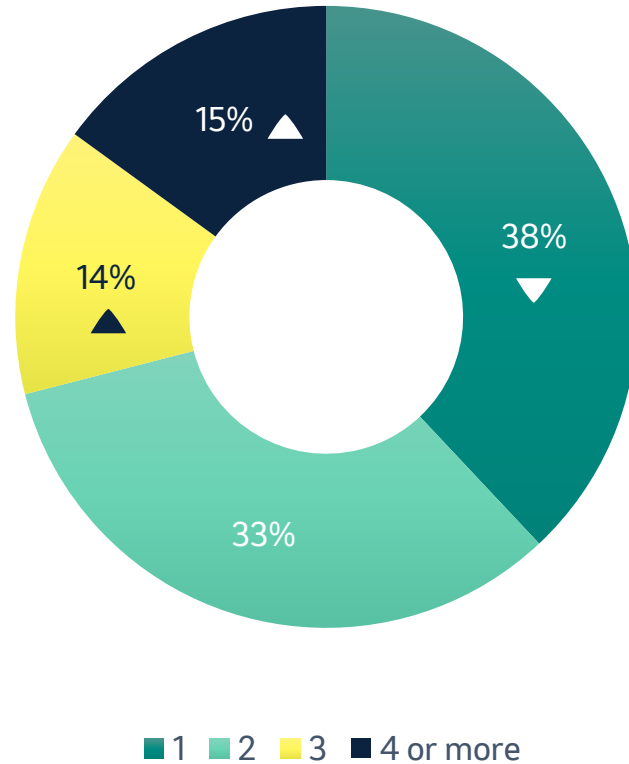
Gender



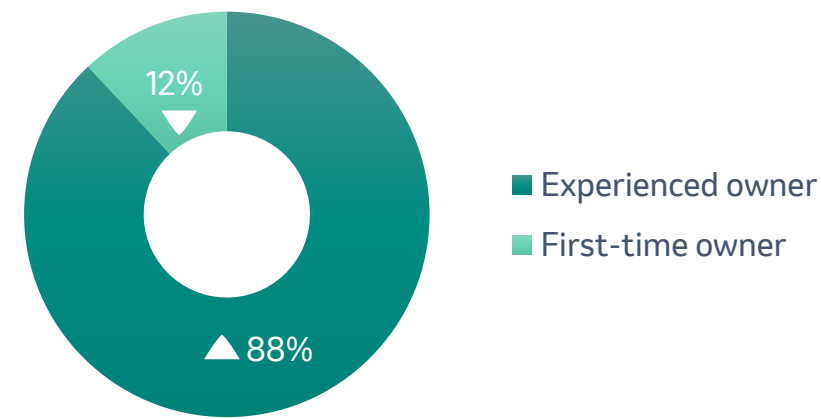
Dog and cat ownership



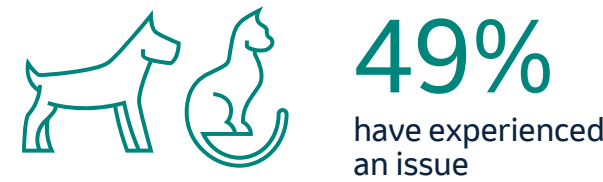
Number of pets in the household



Experience with pets



Experience with fleas and ticks



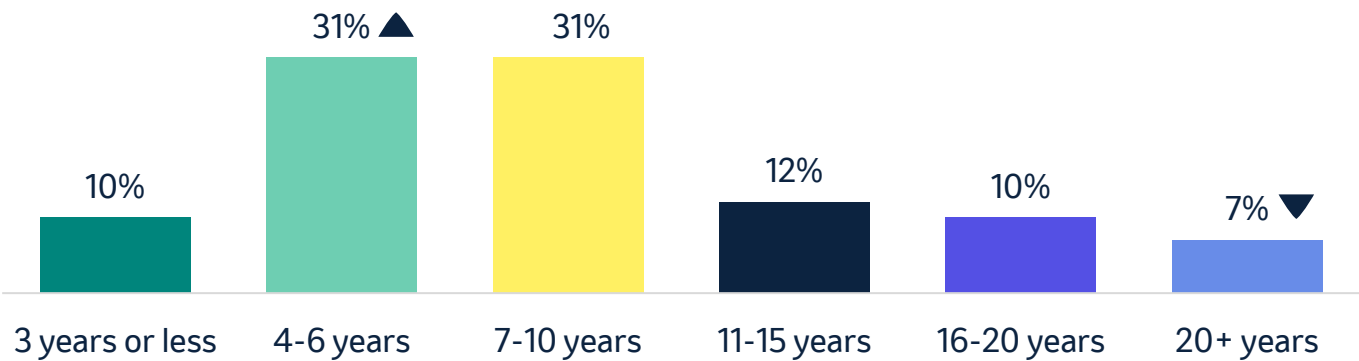
▼ / ▲ = SIGNIFICANTLY LOWER/HIGHER VS. GLOBAL AT 95% CONFIDENCE LEVEL

Veterinarian profile: United States

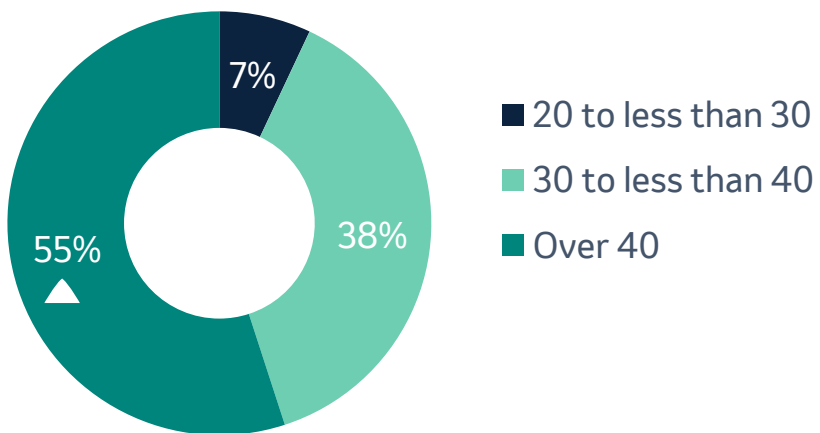
Gender



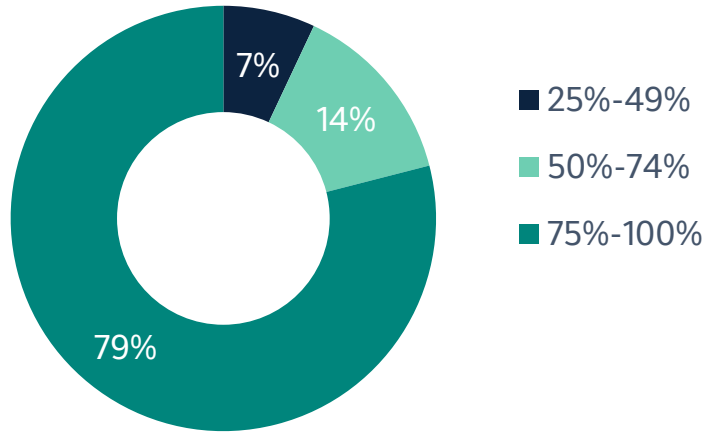
Length of time in practice



Hours worked per week



% of time spent treating cats/dogs



▼ / ▲ = SIGNIFICANTLY LOWER/HIGHER VS. GLOBAL AT 95% CONFIDENCE LEVEL

Current pet care practices



90% Global & 93% US veterinarians agree that pet owners rely on their flea and tick prevention recommendations

Vets emphasize discussing and providing these preventions/ treatments as a part of check-ups

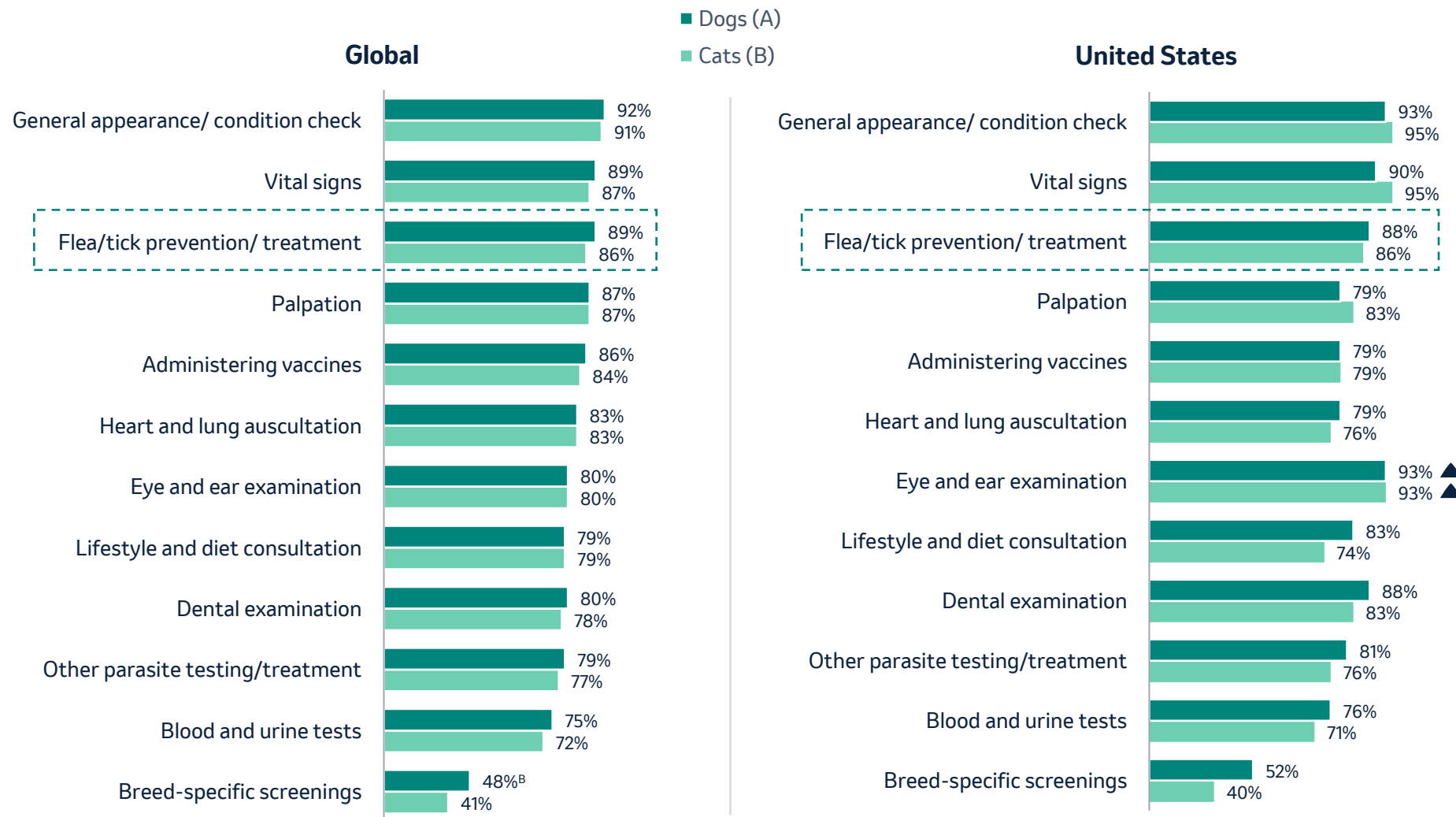
Q6. Which of the following services are a regular part of your check-up process for dogs and cats?

Q11B. To what extent do you agree or disagree with the following statements?

Full scale: strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, strongly disagree, don't know

Base: Global veterinarians (n=582); US veterinarians (n=42)

Services offered in a routine check-up



US vets estimate a quarter of their clients do not bring their pet annually, most commonly due to lack of need/importance

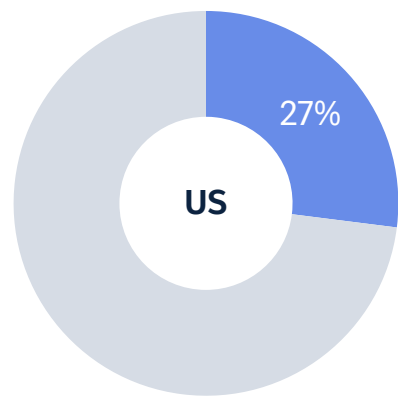
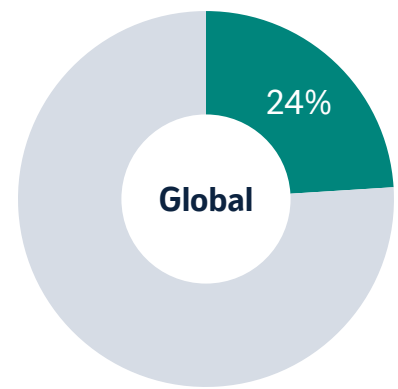
Q10A. What percentage of cat and/or dog owners registered at your practice do not come in annually?

Base: Global veterinarians (n=582); US veterinarians (n=42)

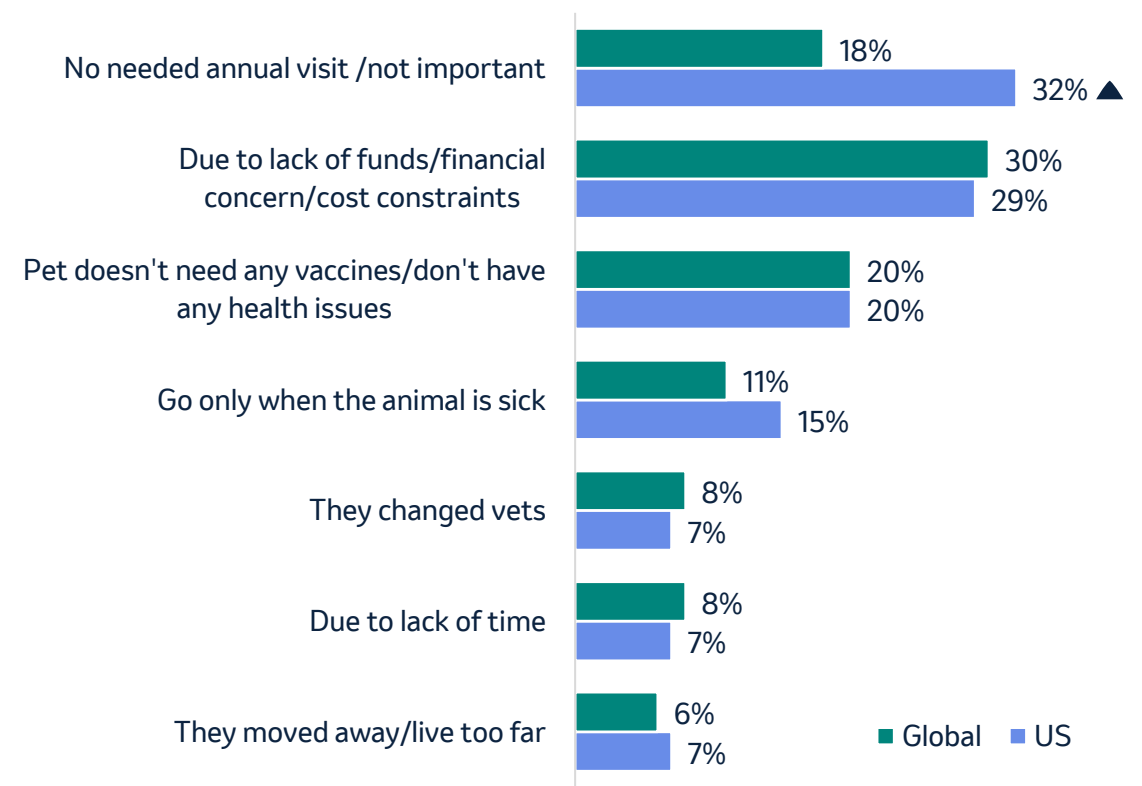
Q10B. You mentioned [x%] of cat and/or dog owners registered at your practice who do not come in annually? Do you know why that is?

Base: Veterinarians who have any clients who do not come in annually: Global (n=566); US (n=41)

Average proportion of pet owners who do not visit the practice annually



Top 5 reasons why pet owners do not come in annually
(based on coded responses)



Views towards flea and tick treatment

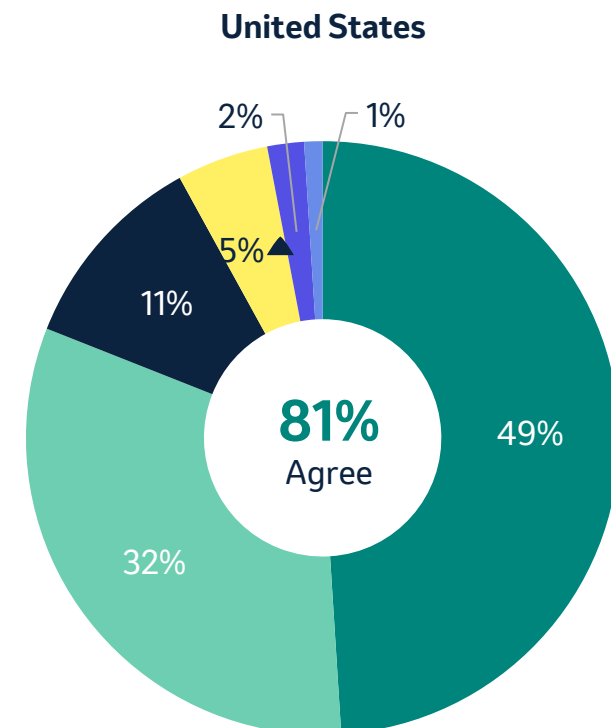
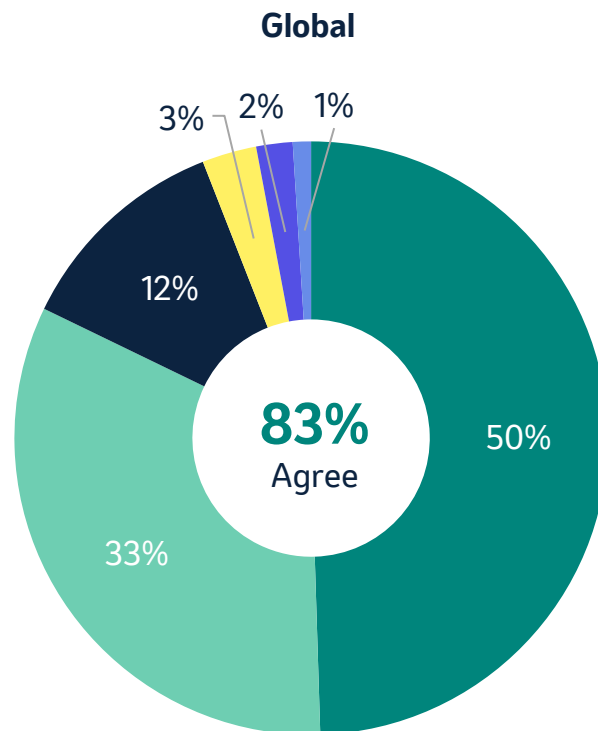


8 in 10 pet owners consider flea and tick treatment a crucial part of pet care

Q29. To what extent do you agree or disagree with the following statements?

Base: Global pet owners (n=4072), US pet owners (n=427)

“Flea/tick treatment is a crucial part of my cat and/or dog's health care”



■ Strongly agree
 ■ Neither agree nor disagree
 ■ Strongly disagree

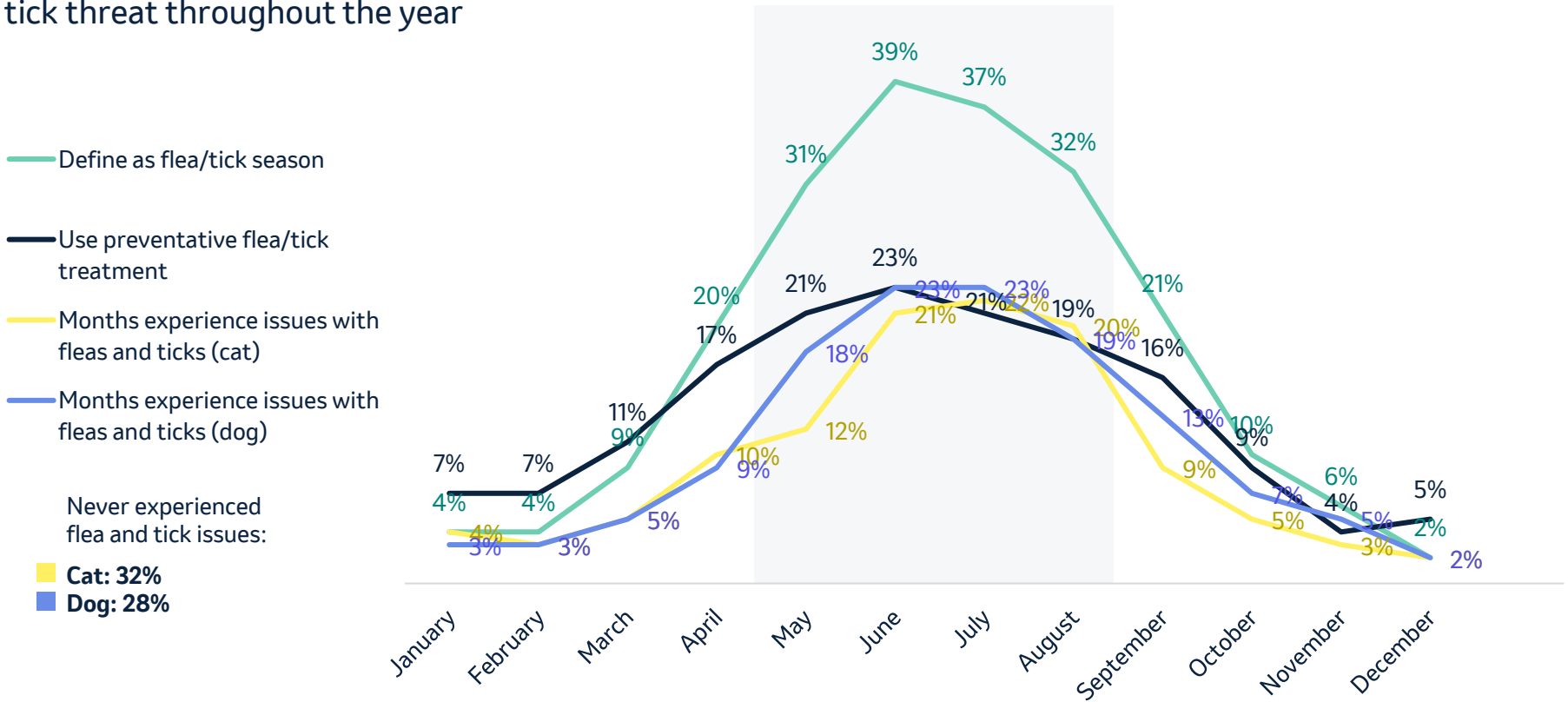
■ Somewhat agree
 ■ Somewhat disagree
 ■ Don't know

▼ / ▲ = SIGNIFICANTLY LOWER/HIGHER VS. GLOBAL AT 95% CONFIDENCE LEVEL

Despite US pet owners being more likely to define and treat year-round, action lags as about 7 in 10 do not treat year-round

United States

Pet owner perceptions of flea and tick threat throughout the year



Year-round

	Global	US
Define as flea and tick season	10%	16% ▲
Use Treatment	18%	29% ▲
Experience issues (cat)	4%	5%
Experience issues (dog)	4%	8% ▲

Q23. Thinking specifically about fleas and ticks, which of the following months do you...?

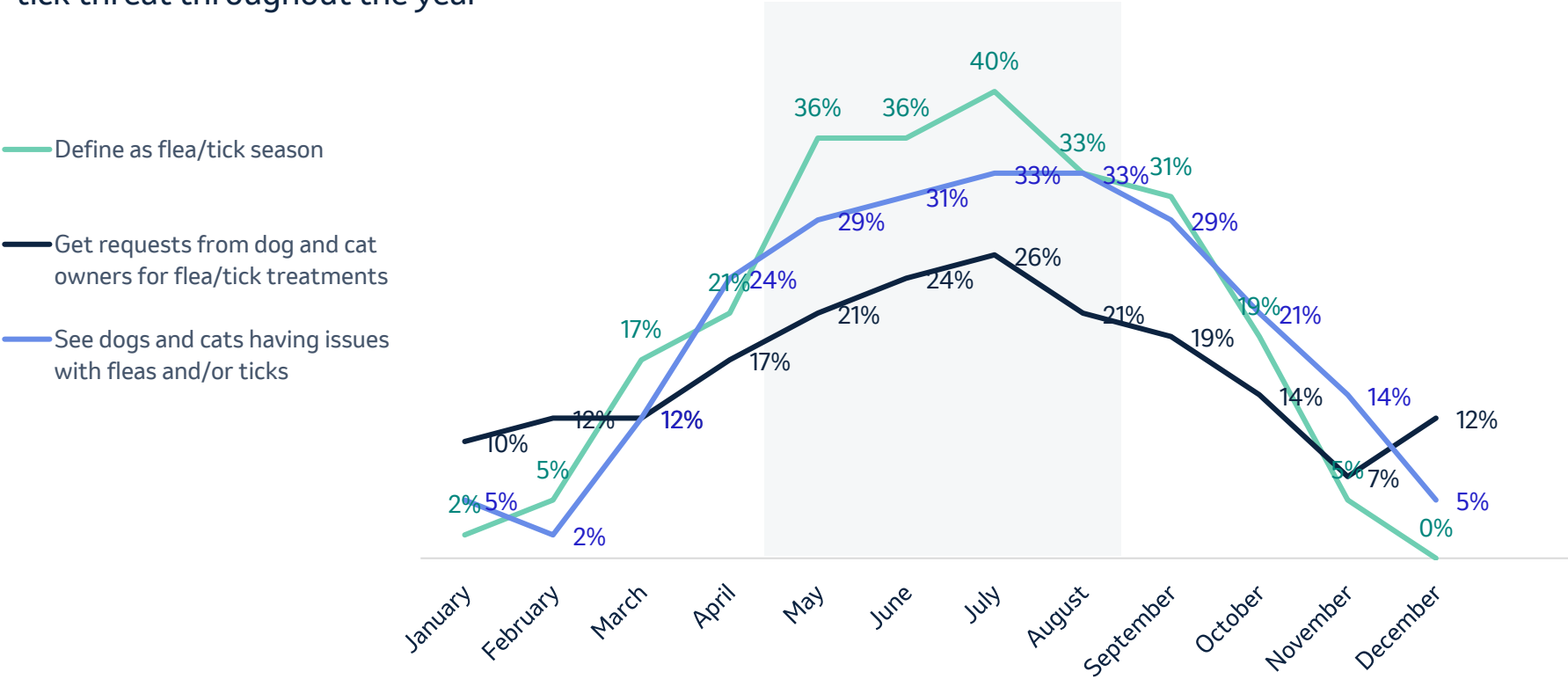
Base: US pet owners (n=427) , US cat owners (n=234), US dog owners (n=330)

▼ / ▲ = SIGNIFICANTLY LOWER/HIGHER VS. GLOBAL AT 95% CONFIDENCE LEVEL

More than half of US veterinarians define the flea and tick season as year-round, with even more observing issues throughout the year

United States

Veterinarian perceptions of flea and tick threat throughout the year



Year-round

	Global	US
Define as flea and tick season	47%	57%
Get requests for treatment	55%	67%
See issues	52%	60%

Q7. Which of the following months do you...?
Base: US veterinarians (n=42)

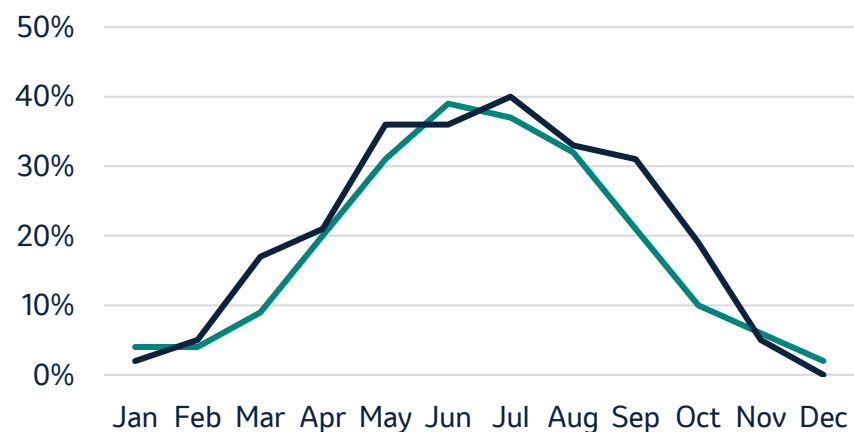
▼ / ▲ = SIGNIFICANTLY LOWER/HIGHER VS. GLOBAL AT 95% CONFIDENCE LEVEL

Vets in the US are over three times more likely to define flea and tick season as year-round, while pet owners primarily emphasize the summer months

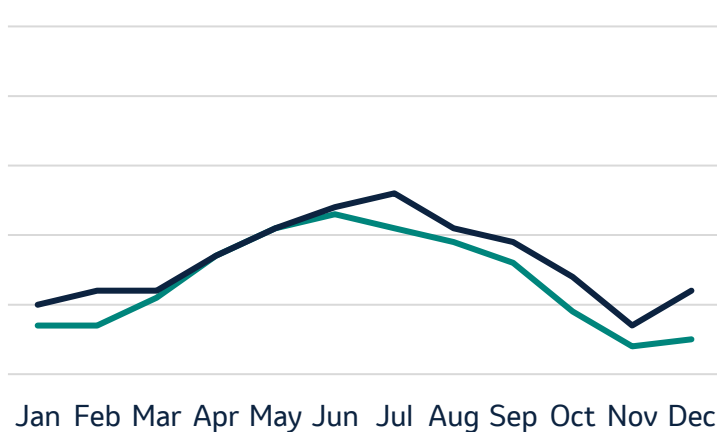


United States

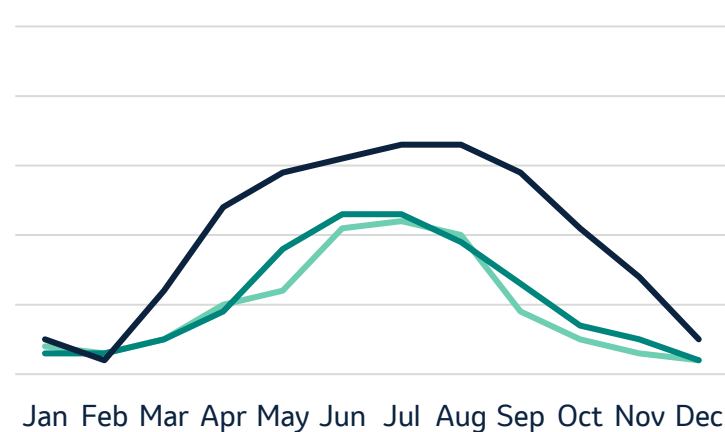
Defining flea and tick season



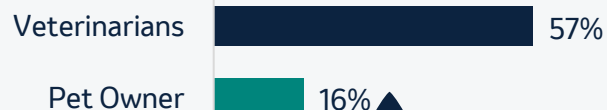
Use/get requests for treatments



Experience/see flea and tick issues



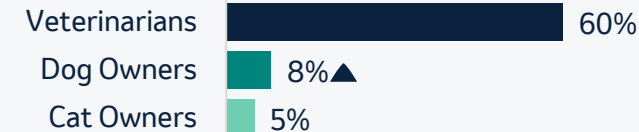
Year Round



Year Round



Year Round



Q23. Thinking specifically about fleas and ticks, which of the following months do you...?

Base: US pet owners (n=427), US cat owners (n=234), US dog owners (n=330)

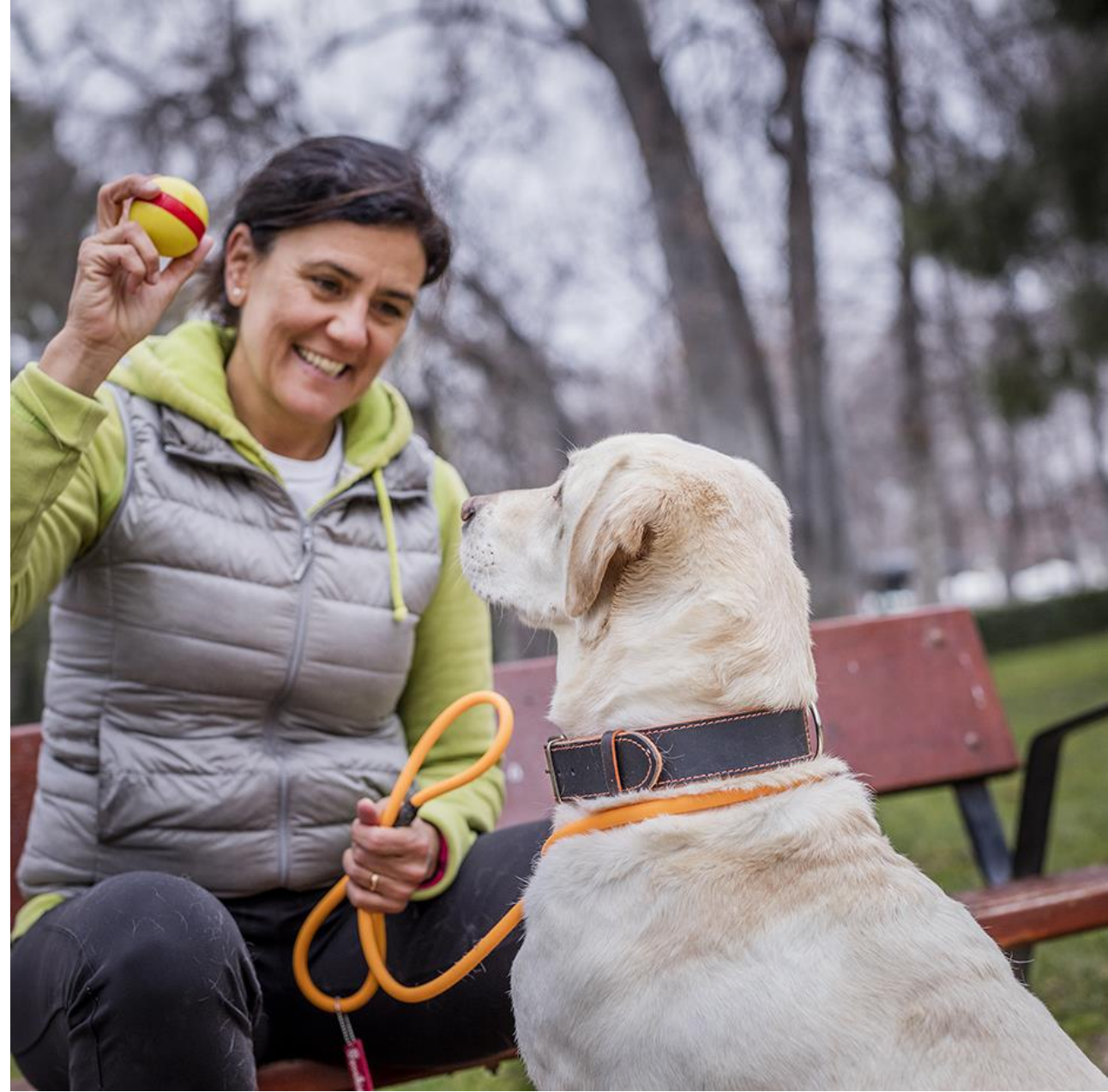
Q7. Which of the following months do you...?

Base: US veterinarians (n=42)

VETERINARIANS REPORT A HIGHER RESPONSE RATE AS THEY CONSIDER ALL THE PETS THAT COME TO THEIR PRACTICE, WHILE PET OWNERS REFLECT ONLY ON THEIR PERSONAL EXPERIENCES.

▼ / ▲ = SIGNIFICANTLY LOWER/HIGHER VS. GLOBAL AT 95% CONFIDENCE LEVEL

Compliance with flea and tick treatments and prevention



More than 3 in 5 US pet owners see flea and tick-borne illnesses as harmful to their pet, with half expressing the same concern towards their family

Perceived harm of flea and tick-borne illnesses

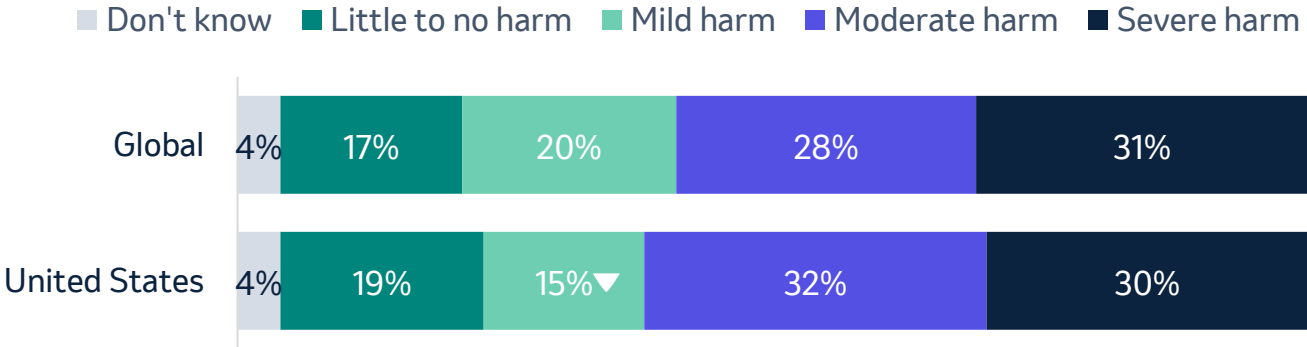
Q37b. How harmful do you believe that flea and/or tick-borne illnesses can be to your pets/ you and your family?

Full scale: little to no harm - with no noticeable change to health; mild harm - gets better on its own without intervention or medication; moderate harm that requires an appointment and possibly prescription medication or other treatment for recovery; severe harm that could have long-term effects or even death; don't know

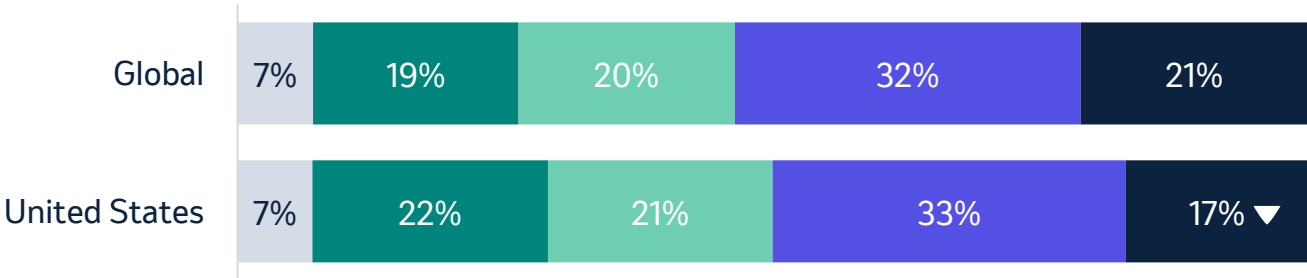
Base: Global pet owners (n=4072), US pet owners (n=427)



To Pets



To You/ Family



▼ / ▲ = SIGNIFICANTLY LOWER/HIGHER VS. GLOBAL AT 95% CONFIDENCE LEVEL

Many vets believe most of their clients exhibit non-adherence, including not treating year-round or missing treatment all together, with higher rates in the US

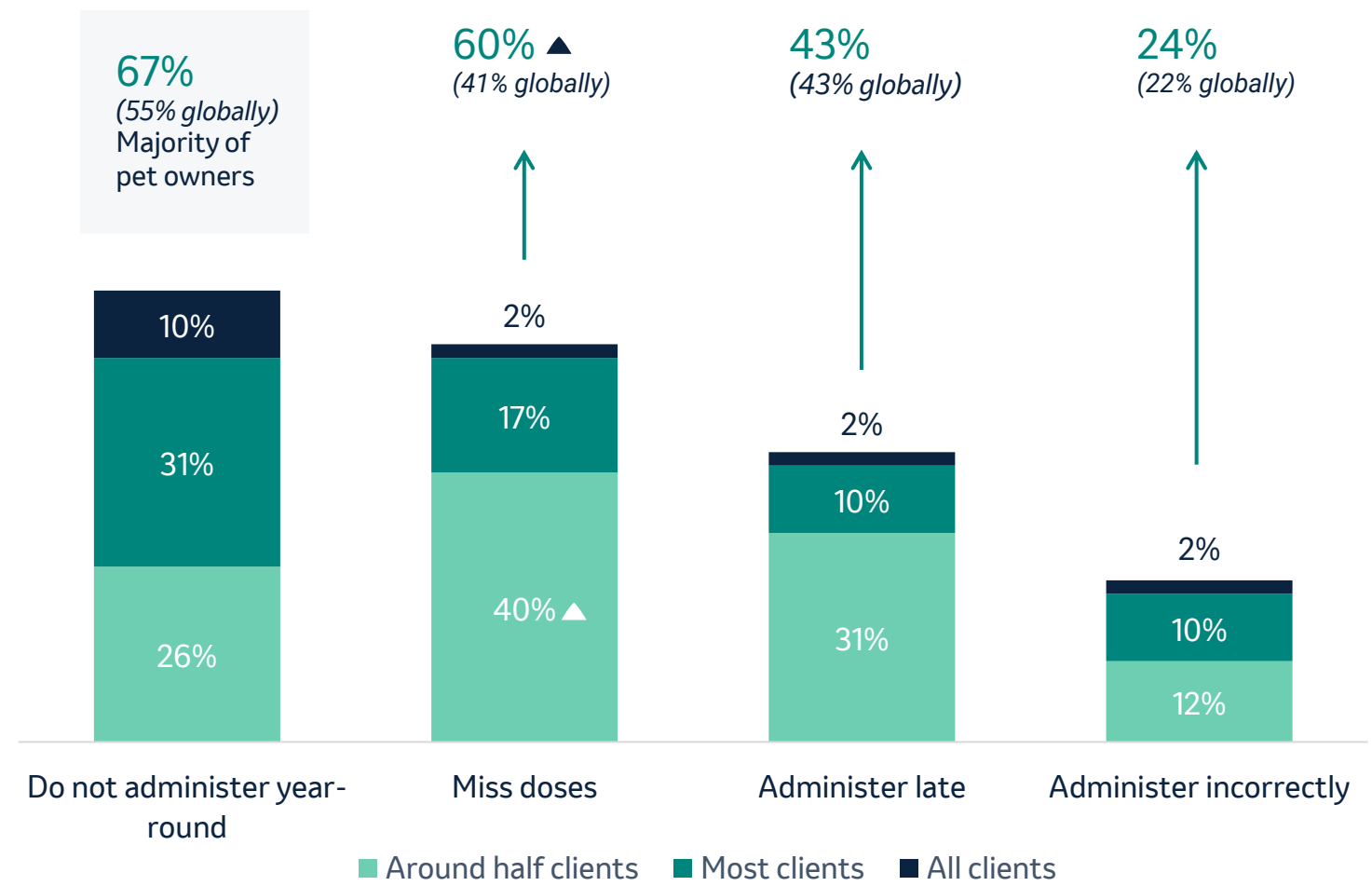
Q13. By your estimation, how many cat and/or dog owners who come to your practice ...?

Full scale: all of the clients, most of the clients, around half of the clients, some clients, very few clients, if any, none of the clients, don't know

Base: Global veterinarians (n=582), US veterinarians (n=42)

United States

Estimations of pet owners' compliance with specific aspects of flea and tick treatment



▼ / ▲ = SIGNIFICANTLY LOWER/HIGHER VS. GLOBAL AT 95% CONFIDENCE LEVEL

Veterinarians may be justified, as around half of pet owners admit that administering flea and tick solutions can be difficult

Q29. To what extent do you agree or disagree with the following statements?

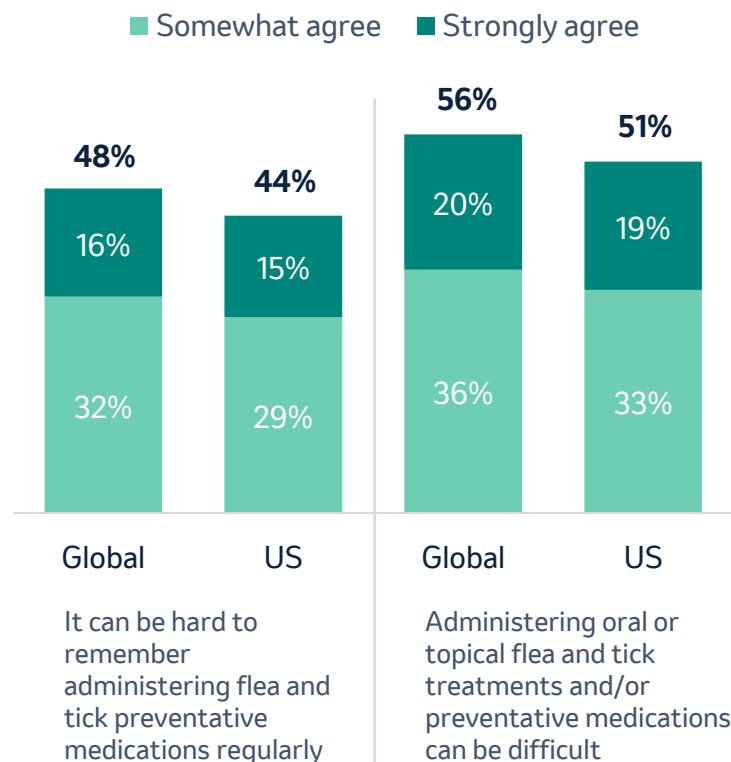
Full scale: strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, strongly disagree, don't know

Base: Global pet owners (n=4072), US pet owners (n=427)

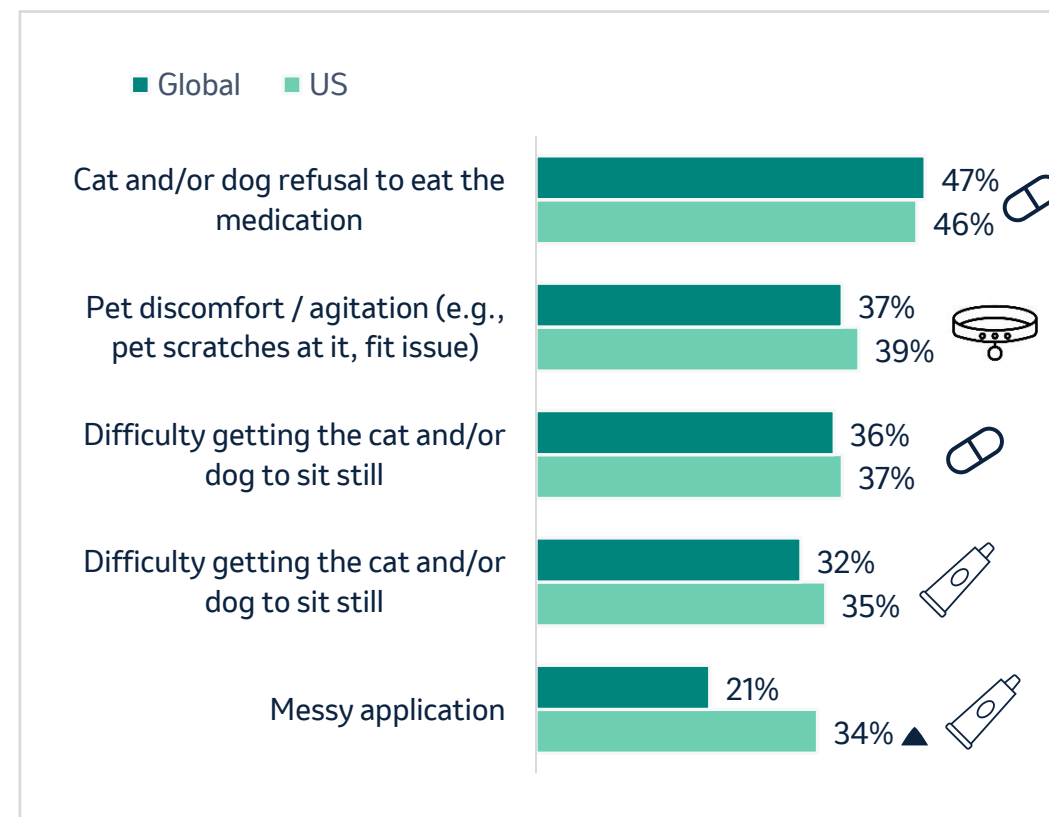
Q30. What are the difficulties have you have experienced when administering oral or topical flea and tick treatments and/or preventative medications?

Base: Pet owners who find it difficult to administer oral/topical flea and tick treatments/preventative medications: Global (n=2288), US (n=219)

Agreement with statements regarding difficulty administering



Pet owner difficulties administering flea and tick medication



▼ / ▲ = SIGNIFICANTLY LOWER/HIGHER VS. GLOBAL AT 95% CONFIDENCE LEVEL

Many US pet owners admit to less than adherent approaches to administering flea and tick treatments

United States

Treatment administration frequency

Q33ab/b. How often do you administer these treatments and/or medications to your cat/dog?

Base: US pet owners using preventative treatment, base size varies

	Oral Medications		Topical Ointments		Fleas and Ticks Collars		Fleas and Ticks Sprays	
	Dog Owners (A)	Cat Owners (B)	Dog Owners (A)	Cat Owners (B)	Dog Owners (A)	Cat Owners (B)	Dog Owners (A)	Cat Owners (B)
Monthly	48% ▲	46% ▲	38%	41%	28%	26%	35%	27%
Once per year	11% ▼	11%	12%	7% ▼	16%	21%	18%	16%
Only during flea and tick season	15%	17%	18%	18%	22%	24%	24%	39% ^A
When I remember to	2%	4%	2%	6%	10% ▲	8%	7% ^B	1%
When I see a flea/tick on them	3%	11%	12%	8%	5%	3%	7%	9%
As indicated on the label	21%	11%	17%	21%	19%	17%	10%	7%

LETTER INDICATES SIGNIFICANT DIFFERENCE VS. INDICATED SUBGROUP AT A 95% CONFIDENCE LEVEL

▼ / ▲ = SIGNIFICANTLY LOWER/HIGHER VS. GLOBAL AT 95% CONFIDENCE LEVEL

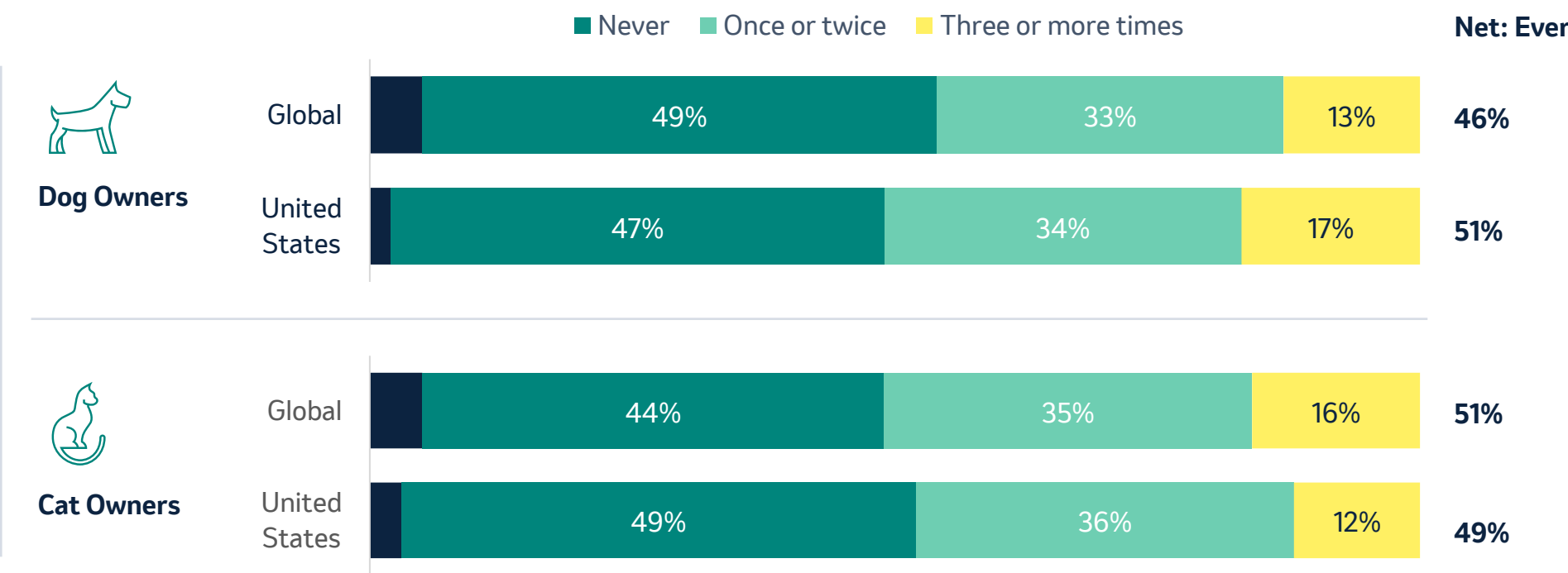
And over the past year, about half of US pet owners admit to occasionally forgetting to administer treatment

Frequency of forgetting to administer flea and tick treatment/preventative medication in the past year

Q34. Within the past year, how many times, if ever, have you forgotten to administer a flea and tick treatment and/or preventative medication to your [cat/ dog/ pets]?

Full scale: never, once or twice, three to five times, six times or more, not sure

Base: Owners using preventative treatment: Global dog owners (n=2953), US dog owners (n=305), Global cat owners (n=2009), US cat owners (n=202)



▼ / ▲ = SIGNIFICANTLY LOWER/HIGHER VS. GLOBAL AT 95% CONFIDENCE LEVEL

Solution:
Perceptions
towards a yearly
medication



US pet owners place high trust in a once-yearly medication, only trailing oral, though trust trails their global peers

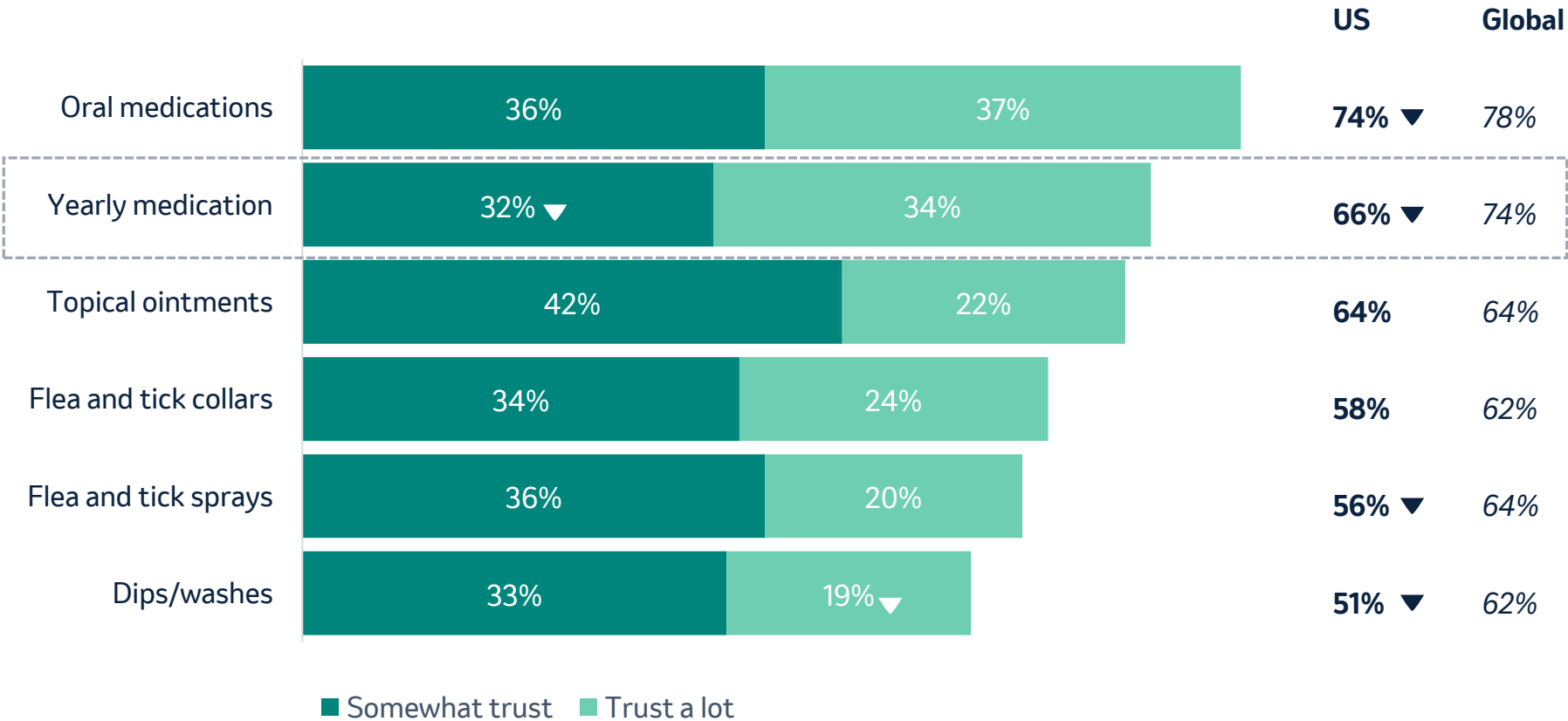
United States

Pet owner trust in flea and tick medication options

Q31. To what extent would you trust or distrust the following treatments and/or preventative medications for fleas and ticks?

Full scale: trust a lot, somewhat trust, neither trust nor distrust, somewhat distrust, distrust a lot, don't know

Base: Global pet owners (n=4072), US pet owners (n=427)



▼ / ▲ = SIGNIFICANTLY LOWER/HIGHER VS. GLOBAL AT 95% CONFIDENCE LEVEL



Duration of effect is among the top considerations when choosing a new flea and tick treatment, with US pet owners emphasizing cost more

Q37. Imagine looking for a new flea and tick a treatment and/or preventative medication for your cat and/or dog. How would you rank the following considerations in terms of how important they are when making your decision? Please rank the options below, where 1=the most important consideration. If there are any other considerations, please select the 'other' answer option. Rank at least 3 options

Base: Global pet owners (n=4072), US pet owners (n=427)

Q16. From your perspective, what is the most important criteria when you select your recommended flea and tick treatments and/or preventative medications?

Base: Global veterinarians (n=582), US veterinarians (n=42)

Owner: Top 5 considerations viewed as most important when selecting a flea and tick treatment (ranked in top 3 selections)

	Global	US
Safety	37%	41%
Cost	27%	33% ▲
Minimal side effects	30%	33%
Length of effect	31%	29%
Ease of application	26%	27%

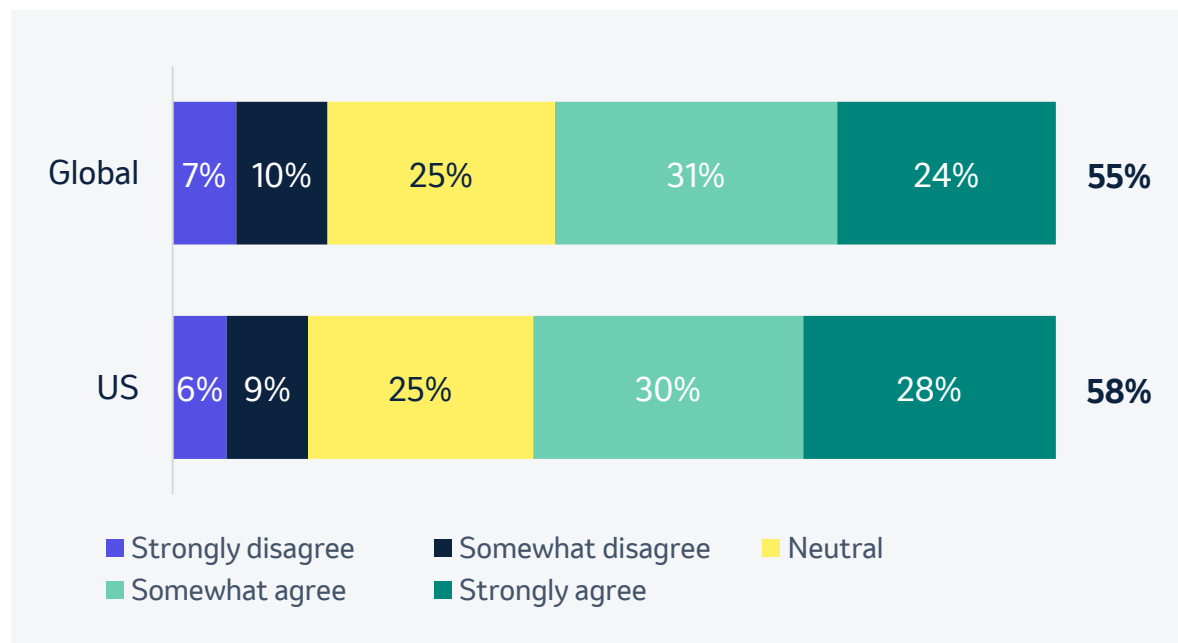
Vets: Top 5 important criteria for recommending flea and tick treatments

	Global	US
Ease of administration	65%	88% ▲
Proven safety record	60%	76% ▲
Minimal side effects	65%	71%
Broad-spectrum efficacy	64%	60%
Duration of the prevention	54%	48%
Cost of treatment	48%	48%

Likelihood to utilize or recommend an annual flea and tick medication is higher in the US



“I would prefer to treat my cat and/or dog for fleas and ticks less frequently”



Q29. To what extent do you agree or disagree with the following statements?

Base: Pet owners (n=4072), US (n=427)

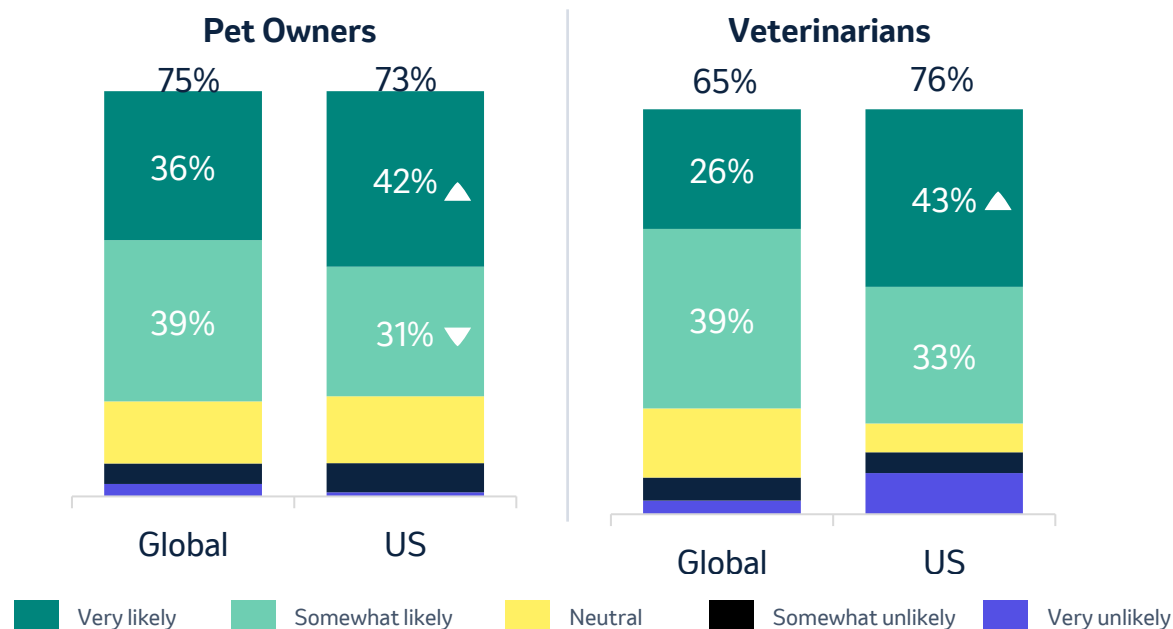
Q35. How likely or unlikely would you be to try a treatment and/or preventative medication that protects your cat and/or dog from fleas and ticks for up to a year?

Base: Pet owners not currently using yearly medications or injections: Global (n=2793), US (n=339)

Q14. How likely or unlikely would you be to start recommending a once-yearly medication for flea and tick prevention and treatment?

Base: Veterinarians not administering/recommending yearly injections: Global (n=458), US (n=42)

Likelihood of trying or recommending a once-yearly flea and tick medication



▼ / ▲ = SIGNIFICANTLY LOWER/HIGHER VS. GLOBAL AT 95% CONFIDENCE LEVEL